

2015 | 2016 ANNUAL REPORT



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MISSION

HOTREC is the umbrella Association of Hotels, Restaurants and Cafes and similar establishments in Europe, which brings together 43 National Associations in 30 countries.

Our mission is to promote the hospitality industry's contributions to European society and represent, protect and defend its interests to the European Institutions.



FOREWORD

Dear Readers,

Although the EU economy is recovering from the crisis, the tourism sector is still facing many challenges.

Businesses have difficulties to access finance. Skilled professionals are hard to retain. At the same time, there is a huge gap between the skills learned by professionals and those needed by the industry. But above all, the sector faces the challenge of changing consumer expectations. Today's travellers want customised holidays and authentic experience. New, innovative business models are disrupting the market and change the way tourism works. The accommodation sector is one of those most affected by the sharing economy phenomenon.

It is essential that we deal with these challenges to keep up with the increasing competition from emerging destinations. Although tourist numbers will go up, our market share is predicted to go down. In 2000, the EU had 51% of the world's market. Today we are below 40%, and forecasts indicate a further drop to only 31% by 2030.

This is why the EU tourism policy priorities and actions under my mandate focus on helping the sector enhance its competitiveness.

First, we are working on lifting the obstacles businesses are facing. The Commission adopted the new Single Market Strategy last October and we must ensure the enforcement of its principles and rules to tourism services. We are also helping SMEs to use new and existing financial resources smarter. They need to know about the financial support offered by the Juncker Plan, the Structural Funds and the COSME Programme.

Second, we are putting in place concrete actions to support tourism SMEs to seize the opportunities of the digital revolution. For example, we are helping them to enhance their digital skills through webinars and tutorials on the Tourism Business Portal. Furthermore, in 2016, the Commission will issue a set of guidelines on how the existing EU rules should apply to the sharing economy.

Third, careers in tourism must become attractive to young people. We work together with the European Parliament to promote quality cross-border traineeships and mobility of workers. We are going to give more visibility to the tourism sector on the portal for traineeships, Drop'pin and the European Alliance for Apprenticeships.

Fourth, we are working to give more visibility to our unique cultural and natural heritage and to the incomparable variety of transnational tourism offers.

All these are steps towards attracting more investment in the sector. To keep our leading position in the global tourism market, we must invest in key areas, such as energy efficiency, digitalisation, infrastructure, transport and connectivity.

Industry associations have a crucial role to play. I would like to congratulate HOTREC for its strong commitment and for leading in many areas, for example by joining the European Alliance for Apprenticeships. I am also aware of HOTREC's engagement in the development of training for special access needs under Erasmus+. HOTREC is among the frontrunners also in sustainability and energy efficiency through its involvement in the Nearly Zero Energy Hotels Initiative.

In a nutshell, HOTREC has been and I hope it will continue to be a valuable partner for us in creating the right conditions for businesses.

by Ms Elżbieta
Bieńkowska,
Commissioner
for Internal Market,
Industry,
Entrepreneurship
and SMEs



"I would like to congratulate HOTREC for its strong commitment and for leading in many areas, for example by joining the European Alliance for Apprenticeships"

FOSTERING SUSTAINABLE AND RESPONSIBLE TOURISM, THE WAY AHEAD, BY UNTWO SECRETARY GENERAL



International tourist arrivals worldwide grew by 4.4% in 2015 to reach a total of 1,184 million, according to the latest UNWTO World Tourism Barometer. UNWTO estimates that this number will grow by another 3.3% on average every year, reaching 1.8 billion by 2030. Tourism represents today nearly 10% of global GDP, is responsible for one in eleven jobs and generates 6% of global trade. These numbers reveal the fundamental role tourism can play in advancing economic growth and development in many parts of our globe, namely in Europe.

Europe, the world's most visited regional destination in the world, recorded a robust 5% increase in international tourist arrivals in 2015 despite many challenges. This was the highest increase across all regions and a notable result for a rather mature region. Tourism's contribution to employment, trade and investment in the European continent is a clear example of how the sector has been instrumental in supporting the economic recovery.

However, with growth comes responsibility. At a moment when the international community embraces a new sustainable development agenda set in the 17 Sustainable Development Goals (SDGs) tourism can and should be at the forefront of sustainability.

The commitment by HOTREC to the UNWTO Global Code of Ethics for Tourism, signed on the occasion of its 71st General Assembly, is a very welcome step to promote the values of responsibility and sustainability among the hospitality industry of Europe. The Code is the fundamental frame of reference for responsible and sustainable tourism, designed to guide key-players in tourism development. Addressed to governments, the travel sector, communities and tourists alike, it aims to help maximize the sector's benefits while minimizing its potentially negative impact on the environment, cultural heritage and societies across the globe.

The leadership and commitment of the hospitality industry in Europe to social responsibility in tourism has also been expressed through the participation of HOTREC in the Executive Committee of the World Tourism Network on Child Protection promoted by UNWTO. Featuring a wide range of tourism stakeholders - from governments, international organisations and non-governmental organisations (NGOs) to private sector and media, the Network works to prevent all forms of youth exploitation in the tourism sector, a major task which can only be achieved through strong partnerships.

HOTREC, a much valuable UNWTO Affiliate Member, is today a key partner for us at UNWTO and for the industry as a whole in advancing the sector towards a more sustainable future. As we prepare to celebrate 2017 as the International Year of Tourism for Sustainable Development, we look forward to strengthening our relationship with HOTREC.

Congratulations on your achievements of 2015 and your strong leadership of the hospitality industry in Europe.

"HOTREC, a much valuable UNWTO Affiliate Member, is today a key partner for us at UNWTO and for the industry as a whole in advancing the sector towards a more sustainable future"

Taleb Rifai, Secretary General



MESSAGE FROM HOTREC PRESIDENT AND CHIEF EXECUTIVE OFFICER



Two news Members joined the membership, taking HOTREC's representativeness to 30 European countries

Tourism for growth and jobs!

2015 saw a 5% increase in European tourist arrivals versus 4% for the rest of the world, showing that Europe kept leading the way ahead despite many challenges.

This is excellent news for society as the hospitality industry, which employs 80% of the total EU tourism workforce*, is one of the few sectors which still keep creating jobs.

The promotion of tourism topped HOTREC's agenda which strongly contributed to the European Parliament's INI report on the promotion of tourism and also to the tourism Manifesto, an industry-led initiative in which HOTREC is part of the steering group.

HOTREC and its Members reached a new milestone in online distribution, where France and Germany banned parity clauses, allowing hoteliers to set free prices and conditions again. Another significant achievement was HOTREC's policy paper and Chart towards a sustainable and responsible "sharing" economy.

HOTREC also achieved excellent results in the broader policy field, e.g. on data protection or on official hygiene controls. The Package Travel Directive also comprises some leeway for hoteliers, as a few services will not fall under the scope of the Directive. Not to forget HOTREC's contribution to the Nearly Zero Energy Hotels project (neZEH) and hotel classification, which flagship, Hotelstars Union, received full support from the EU institutions.

HOTREC and its trade union counterpart EFFAT joined the European Commission pledge for apprenticeships and developed a joint statement on the "sharing" economy to protect the rights of employees and fight against undeclared work. HOTREC signed the Private Sector Commitment to the UNTWO Global Code of Ethics for tourism and embarked into an Erasmus+ programme on accessibility, aimed at developing online training to better serve people with specific needs.

As part of its reshaping, HOTREC kept developing new services, e.g. a pan-European digital best practice and knowledge sharing platform, and launched an internal consultation which confirmed digitalisation and the reduction of administrative and fiscal burdens as absolute priorities for 2016.

Lastly, the Association of Hotel and Restaurant of Lichtenstein (LHGV) and the Bulgarian Association of Hotel and Restaurant (BHRA) joined the membership, taking HOTREC's representativeness to 30 European countries.

We would like to thank the membership for its ongoing funding, the Secretariat for their commitment and many achievements and our project partners for their continuous support.

*Sources: Eurostat

MESSAGE FROM MEP CLAUDIA TAPARDEL AND MEP ISTVÁN UJHELYI



"I deeply appreciate that HOTREC has always been a solid partner for the Intergroup of European Tourism Development and Cultural Heritage in the European Parliament."

Dear friends,

HOTREC is the perfect example of how the whole tourism sector should contribute to the development of European Tourism policy making.

Indeed this association has always acted swiftly and with determination in supporting positive changes in the Tourism sector. I deeply appreciate that HOTREC has always been a solid partner for the Intergroup of European Tourism Development and Cultural Heritage in the European Parliament.

HOTREC has always defended the SME's position in the European business 'ecosystem'. It is our common view that brought us together to organise a very important debate in September 2015: "Unlocking SMEs' potential for jobs creation and growth: the digital challenges". Also, I would like to personally thank HOTREC for supporting the European Tourism Manifesto for Growth and Jobs. This shows without a doubt that the European Tourism sector stands united before all challenges.

Last but not least, it is with the highest regard that I am grateful for HOTREC's support in a very important project which I actively promote in the European Parliament: naming 2018 as the European Year of Tourism and Cultural Heritage.

I would like to assure you of my full commitment to bringing tourism at the top of European priorities. I am convinced that only by continuing the good collaboration we had so far we can achieve our common goals and objectives, and push European Tourism to the next level.

With the utmost respect, your friend,

Claudia Tapardel

Co-chair of the Intergroup for European Tourism Development, Cultural Heritage, Ways of St. James and other Cultural Routes

Tourism has a key importance on our political Agenda in Brussels in 2016. Together with the stakeholders we have reached a lot during the past months. We have a strong Tourism Task Force in the TRAN Committee and an effective Intergroup on Tourism. During its regular meetings many interesting regulated fields of tourism policy were discussed. One of the most important topics was the visa facilitation. With the excellent co-operation of HOTREC and in wider terms with NET, all the progressive and facilitation related amendments were edited and the majority of them were voted by the European Parliament.

The other huge result for the sector was the voted initiative report on Tourism policy. This legal document contains all the relevant fields of our industry to be covered in the following years.

These months our main goal is to get a strong voice of the industry towards the EU institutions. This is the Tourism Manifesto, which is a big step to raise public awareness and give tourism the role it deserves. I am convinced how important is to have a dialogue between the public and private sector.

I remember with pleasure my visit to The Hague for the last General Assembly of HOTREC. As I mentioned there I believe in concrete actions, my motto is: "Tourism on S.P.O.T", special partnership on tourism we need in all areas. As Vice-Chair of TRAN Committee I look forward to working with HOTREC to make even more progress.

István Ujhelyi

Vice-chair of the European Parliament Transport & Tourism (TRAN) Committee



"As vice Chair of TRAN Committee, I look forward to working with HOTREC to make even more progresses"



CORE POLICY ACHIEVEMENTS AND ACTIVITIES



HOTREC constantly strives to develop services to its Members that achieve measurable results for the benefit of the industry in Europe. With this goal in mind, HOTREC conducted various activities and successfully reached a broad number of policy achievements in 2015/2016.

A strong advocacy campaign on the Visa Package to sustain Europe's position on the global tourism market

Following the campaign jointly developed by HOTREC together with NET (Network for the European Private Sector in Tourism), the European Parliament's LIBE Committee supported the new EU Visa package on 15 March 2016, HOTREC will keep campaigning to ensure that the Justice and Home Affairs Council decision will reach an equivalent outcome.

HOTREC successfully fought to update EU Data Protection laws without burdening unnecessarily the sector.

Thanks to a joint and powerful HOTREC and UEAPME campaign, trilogue discussions between the Council, the European Parliament and the Commission reached the positive results below:

- The Data Protection Officer (DPO), whose cost was estimated for SMEs at 12.000€ per year is not made compulsory for hospitality businesses
- Direct marketing will remain possible – meaning that hotels and restaurants will be able to contact old clients for marketing purposes (e.g.: promotions, newsletters, etc.);

Therefore, hospitality businesses will avoid un-necessary compliance costs.

HOTREC obtained a more tourism-friendly Package Travel Directive

HOTREC kept on lobbying on the revision of the EU Package Travel Directive, which is meant to update the legal regime applicable to holiday packages to the new business models which have emerged on the online market.

With this goal in mind, HOTREC closely worked with the Latvian Presidency and with the European Parliament, namely MEP Birgit Collin-Langen, MEP Sergio Cofferati, MEP Dita Charanzová and MEP Anneleen Van Bossuyt, in order to find workable solutions for the hotel industry.

As a result, the new Directive adopted on 25 November 2015, integrates some flexibilities which are tailor-made for the industry, e.g. it lists a number of services which will not fall under the scope of the Directive. This achievement means that the final text will be less burdening and more tourism-friendly than the original EU proposal, thus providing direct benefits to the hotel sector through reduced compliance costs.



HOTREC's successful campaigns on Data Protection and the Package Travel Directive will avoid un-necessary compliance costs to hospitality companies



HOTREC stepped-up its efforts to promote the interests of the restaurant and pub sector and successfully convinced the EU institutions not to impose mandatory fees on restaurants

Key success on the Official controls regulation and new developments in the restaurant and pub sector

In 2015/2016, HOTREC has stepped-up its efforts to increase the relevance of its activities for the restaurant and pub sector, with the creation of a new Task Force and the continuation of its campaign on the revised Official Controls Regulation

Launch of a New Task Force on restaurants and pubs

HOTREC launched in 2015 a new Task Force, which activities aim at developing joint positions on the current policies at EU and national level which have an impact on restaurants, bars and pubs.

The industry focuses on the following EU topics: the circular economy and the reduction of food waste in restaurants, best-practices on allergens information in order to be compliant with the Food Information to Consumer Regulation, nutrition taxation, the revision of the EU guidance document on the implementation of HACCP principles, activities to reduce alcohol related harms at EU level, accessibility of restaurants, bars and pubs, as well as brewery contracts.

Successful campaign against new mandatory inspection fees for restaurants

HOTREC is involved in the revision of the EU Official Controls Regulation. This legislation, which sets the framework for national authorities to organise and finance food safety and hygiene controls in the food sector, directly impacts the restaurant sector.

HOTREC campaigned to ensure that the revised EU Regulation would not impose a new fee on restaurants to finance official controls by national public authorities, and would set reasonable and objective transparency criteria for public authorities who wish to publish the hygiene performance of restaurants.

Thanks to a close cooperation with the successive EU presidencies, as well as with the office of MEP Karina Kadenbach, both the Council of the EU and the European Parliament agreed not to impose any mandatory fee on restaurants. HOTREC activity in this field is therefore preserving the economic health of the restaurant sector by avoiding new financial burdens.

HOTREC leads the way forward on online distribution

Over the last 12 months, HOTREC led the discussions in Europe on the online distribution of hospitality services.

Key successes in the fight to restore hotelier's entrepreneurial freedom on the online market

One of the biggest concerns of the industry is the lack of freedom in setting prices and conditions when establishments are selling their services. So-called parity clauses are often hindering this freedom by demanding the most favourable selling conditions also for the intermediary.

These barriers were removed in France and to a substantial part in Germany over the last 12 months. In France the new Law Macron, banned parity clauses from contracts between hotels and Online Travel Agents. Thus, thanks to HOTREC and its Members, hoteliers are now free to set their own prices and conditions on their different distribution channels.

In Germany, the Competition authority banned the parity clauses of Booking.com. This ban also includes its narrow parity clauses, which were applied since summer 2015 across Europe, allowing for the hoteliers selling their rooms cheaper on third party websites, but still demanding the same conditions in the relation of Booking.com and the hotel. HOTREC considers as a big success that both France and Germany have been able to widely restore entrepreneurial freedom.

Launch of an awareness raising campaign on the benefits of direct booking

In December 2015, HOTREC initiated a campaign which recognizes that the different distribution and booking channels all have their advantages and benefits for both the consumers and the providers, therefore enriching consumers' choice and businesses' opportunities. However, booking direct allows to be in direct contact with the service provider thus facilitating answering directly, confidentially and efficiently to specific personal requests. To book Direct also means receiving first-hand information about availability or special services or offers.



Setting fair and transparent principles applying to online comparison tools thanks to an excellent cooperation with the European Commission

HOTREC actively cooperated with the European Commission and relevant stakeholders to develop some key principles which should be followed by online comparison tools. These principles will increase transparency for consumers who look online at the most suitable solutions for their needs. They shall clearly indicate to consumers when they actually see paid for results or rankings. This could also help in getting more transparency in business operations in the online distribution market, which is to the clear benefit of the hospitality industry.



Hoteliers are now free to set their own prices and conditions on their different distribution channels in France and Germany

HOTREC sets the way ahead towards a responsible and sustainable 'Sharing' economy

— Levelling the Playing Field POLICY PAPER ON THE SHARING ECONOMY



"The 10-point charter created by HOTREC is a very realistic and balanced way to set down principles"

UNWTO Secretary General Taleb Rifai,
HOTREC Press Conference, 5 November 2015

As platforms offering accommodation for tourists and business travellers outside of the regulated tourist accommodation market have been on the rise over the last years, the hospitality industry developed a strategy supported by many stakeholders in the tourism sector.

A Chart to ensure a sustainable, fair and responsible 'sharing' economy

In order to raise public authorities' awareness on the challenges of the 'sharing' economy, HOTREC developed a policy paper describing the phenomenon and proposing a 10 steps Chart towards a sustainable and responsible 'sharing' economy.

It lists in particular the need of registration and measurement of the activity, of compliance with safety and security regulations, as well as fiscal obligations, the need for protecting employees' rights and the quality of life of neighbourhoods. The European hospitality industry considers that the current regulatory vacuum is providing grounds across Europe for risks in consumer protection and safety, unfair competition, as well as for grey areas of economic activities.

The United Nations World Tourism Organisation (UNWTO) also welcomed the paper, as "an important contribution to the discussions around the 'sharing economy' in the tourism sector" and underlines the need to "find progressive solutions to safeguard consumer rights and quality standards while ensuring a level playing field for all businesses".

HOTREC promoted the policy paper on various political forums across Europe and engaged its Members in raising authorities awareness at national level.

HOTREC received the support of the European Parliament

HOTREC welcomed the European Parliament's report on the promotion of tourism in Europe adopted on 29 October 2015, which states, "that for the sake of consumer protection the security, safety and health regulations applicable to the traditional tourism sector should also apply to tourism services provided on a commercial basis within the sharing economy". This support is the result of HOTREC's awareness raising campaign and regular contacts with the European Parliament.

HOTREC also organised a workshop on the 'sharing' economy, which included the issue of 'private restaurants'. This type of services within the sharing economy is also on the rise and raise similar concerns about consumer safety, specifically as all types of businesses or providers offering food (even the smallest ones) have to comply with basic food hygiene requirements to protect consumers' health.

Promote a sustainable and responsible hospitality industry in Europe

The hospitality industry is actively involved in the development of sustainable tourism, as it has become a critical issue. For this reason, HOTREC developed key actions over the last 12 months.

Promoting sustainable and competitive hotels through energy innovation

HOTREC participated to several high level events on the European Initiative Nearly Zero Energy Hotels (neZEH) aimed at accelerating the rate of refurbishments of existing hotels into Nearly Zero Energy Buildings. On the occasion of these events, EU policy makers, representatives from the industry as well as national, regional and local authorities have widely exchanged views and discussed the challenges and opportunities of energy innovation as a means to enhance sustainability and competitiveness in the hotel sector.

The hotel industry took this opportunity to promote the many existing and innovative examples across Europe and to communicate about the obstacles that entrepreneurs face, which can be overcome thanks to awareness raising campaigns, trainings and workshops, incentives and EU funding.

HOTREC signed the UNWTO Global Code of Ethics for Tourism

On the occasion of its 71st General Assembly, HOTREC signed the Private Sector Commitment to the UNWTO Global Code of Ethics with Mr. Taleb Rifai, Secretary General of the World Tourism Organization and therefore commits to maximize the sector's socio-economic benefits while minimising its impact on the environment, cultural heritage and societies.

The hospitality industry is strongly committed to developing a sustainable and responsible tourism and will continue to participate actively in all initiatives aimed at greening the sector.



"HOTREC's signature of the Private Sector Commitment to the UNWTO Global Code of Ethics for Tourism testifies of the European Hospitality industry's belief in the principles of sustainable and responsible tourism promoted by UNWTO"

Taleb Rifai, UNWTO Secretary General,
5 November 2015, HOTREC 71st General Assembly

HOTREC Executive Committee and CEO with UNWTO Secretary General Taleb Rifai, MEP Cláudia Monteiro de Aguiar and MEP István Ujhelyi during the signing ceremony of the UNWTO Code of Ethics, HOTREC General Assembly in the Hague, 5 November 2015



Joint commitments were adopted by the social partners on the sharing economy and on boosting apprenticeship schemes in the hospitality sector

New steps ahead for the industry thanks to social dialogue

Following the revamp of its agenda in 2014, in order to tackle new industry challenges such as digitalisation and the “sharing” economy, HOTREC and its trade union counterpart EFFAT engaged into joint commitments for the benefits of both employers and employees.

A joint statement on the “sharing” economy

On the occasion of their plenary meeting held on 4 December 2015, EFFAT and HOTREC adopted a joint statement entitled “For a level playing field and fair competition in hospitality and tourism”. Its main aim is to call on public authorities to collect data on the impact of the “sharing” economy on businesses and employment, and guarantee that legislation is fully enforced by all providers, so that customers are protected, employees are treated fairly and entitled to their rights, and businesses benefit from a fair and competitive environment.

Fostering apprenticeship to enhance employees’ skills and facilitate quality recruitments

HOTREC and EFFAT officially endorsed their joint pledge to foster the quality and attractiveness of apprenticeships schemes in the European hotel and restaurant sector.

This will contribute to facilitate the entry of young employees into the labour market, assure a qualified workforce and thus fight youth unemployment. It also fosters a smoother transition from education to work.

Tackling undeclared work and boosting employability in the sector

HOTREC has been officially nominated by the European Commission as an observer to its newly created platform to enhance cooperation in tackling undeclared work.

HOTREC, EFFAT and the Commission also exchanged views on how to give a new impulse to the Hospitality Skills Passport, an online tool aimed at fostering a better match of offer and demand in employment in the sector, facilitating recruitment procedures and boosting labour mobility within the European Union. Similar discussions took place on how to support training and skills development in the sector and customize the training activities to the real needs of companies and employees.

Further develop a responsible late night entertainment sector

The late night entertainment industry is an important segment of the hospitality sector although often unknown in particular with regard to its contribution to the European economy and society. In order to raise its profile, and create an overarching strategy at European level, HOTREC held a strategic workshop on 19 June 2015 in Italy, hosted by its Italian member FIPE. The main achievement was the development of a road map to boost the growth of the sector, and exchange best practices.

Define the late night entertainment sector to better promote its economic contribution to society

Late night entertainment is a net contributor to the European economy, an economic driver for cities and a sector that provides many jobs. Nevertheless, a clear definition of the sector did not exist so far. To address this issue, HOTREC and its Members agreed on the following definition for this segment of the hospitality industry: *"Licensed premises operating late at night, playing music and providing entertainment. The sector includes: Cocktail Bars, Disco Bars, Disco pubs, Cafés, Discotheques and Clubs, Establishments for dancing; Establishments for parties, concerts, cabarets."*

The next step is the collection of data together with the European Commission and the national authorities on the positive contribution of the late night sector to the EU economy as well as specific employment statistics.

A responsible sector which shares best practices

Best practices on responsible drinking were exchanged between HOTREC members, in order to further promote the development of a responsible late night sector. Amongst others, trainings to servers were presented as examples to provide a responsible and high-quality service and a fundamental tool to decrease alcohol related harm.

A night quality label was also presented as a best practice. This label contributes to strengthen security and safety in the night life environment, and shows concretely the sectors' social responsibility credentials. It contains compulsory criteria (e.g. safe transport home; ear plugs, etc.) and voluntary criteria (e.g. air-conditioning; necessity of having first aid kit) towards which establishments need to comply with. As a result, different HOTREC Members are now considering adopting some of the presented best practices.



HOTREC communicates the positive contribution of the late night sector to the EU economy, and promotes best-practice sharing to guarantee quality entertainment

CORE EVENTS

During the past 12 months, HOTREC organised a number of high-level events aimed at promoting the hospitality industry's benefits to society towards European policy and decision-makers.

A Joint HOTREC-UEAPME event to raise awareness on SME's digital challenges

On 15 September 2015, HOTREC and UEAPME organised a joint event on the digital challenges faced by SMEs. The conference, sponsored by MEP Othmar Karas and MEP Claudia Tapardel, provided some 50 stakeholders with the platform to discuss how to promote fair competition and practices on the online market, as well as how to help SMEs boosting their presence on the digital value chain and embracing digital opportunities.

The panellists included among others MEPs Paunova and Monteiro de Aguiar, Ms. Herold from the cabinet of Commissioner Oettinger, Mr. Corazza, Head of Unit Tourism and Ms. Schreiber, Director for the COSME programme both from DG Grow - European Commission and Mr. de Blust, Secretary General of ECTAA.

The main achievement was the recognition of the need to promote a fair and competitive online market and also for SMEs to better engage in ICT also thanks to EU Funding in order to boost growth and jobs creation.

HOTREC Press conference to unveil its policy paper towards a sustainable and responsible "sharing" economy

On 5 November 2015, HOTREC organised a press conference to present its 10 steps Chart towards a responsible and sustainable "sharing" economy, in presence of Mr Taleb Rifai, Secretary General of UNWTO and of MEP Cláudia Monteiro de Aguiar.

During the press conference, Mr. Rifai welcomed the HOTREC's position paper as an important contribution to the discussions around the "sharing" economy in the tourism sector and underlined the need for the tourism sector to find progressive solutions to safeguard consumer rights and quality standards while ensuring a level playing field for all businesses.

"UNWTO welcomes this report by HOTREC as an important contribution to the discussions around the 'sharing' economy"

UNWTO Secretary General Taleb Rifai,
HOTREC press Conference, 5 November 2015



Ms. Anna Herold, from the cabinet of Commissioner Oettinger, MEP Cláudia Monteiro de Aguiar and Mr. Patrice Chazerand, Director of the Digital economy at Digital Europe, during the HOTREC-UEAPME event

Policy breakfast in the European Parliament to promote the Hotelstars Union

On 15 March 2016, HOTREC and Hotelstars Union, thanks to Member of the European Parliament Isabella De Monte, organised a policy breakfast in the presence of several MEPs, the European Commission, online travel platforms, and other tourism industry stakeholders. The aim of the meeting was to discuss hotel classification and to present the harmonised classification system of the Hotelstars Union. In its report on the promotion of tourism in Europe adopted on 29 October 2015, the European Parliament indeed considered "that the Hotelstars Union initiative aimed at gradually harmonising accommodation classification systems across Europe should be further promoted, thus allowing a better comparison of the accommodation offer in Europe and contributing to common service quality criteria".

Hotelstars Union was created in 2009 under the patronage of HOTREC, with the goal to provide a harmonised and comparable hotel classification system in Europe. This system which is based on 270 common criteria provide for a comparable offer in terms of hotel facilities and services along the different star categories. The objective evaluation of the offer, which is conducted by professionals, offers a reliable and measurable system in the new world of reviews provided by different travel websites to the consumers. It is regularly adapting its evaluation criteria to fit market needs, with consumers' involvement.

MEP Isabella De Monte, supported the Hotelstars Union, as being a very good example of bottom-up initiatives coming from the industry. She emphasised that its wider and wider application across Europe provides consumers with a clear comparison of the accommodation offer in Europe but also for visitors from third countries.

The European Commission also expressed its full support to the initiative. Mr. Carlo Corazza, Head of Unit in DG Grow of the European Commission stressed that the initiative also contributes to sustaining European tourism's competitiveness.

It was also promoted that the official stars of the Hotelstars Union are not only visible at the hotels themselves, but are already gradually displayed by some Online Travel Agents. Hotelstars Union offers to hotel booking sites and travel platforms for free the opportunity to get a regular update on the official stars of the classified hotels in the participating countries.

"The Hotelstars Union is a very good example of bottom-up initiatives coming from the hospitality industry. Its wider and wider application across Europe provides consumers with a clear comparison of the accommodation offer in Europe"

MEP Isabella De Monte, European Parliament policy breakfast, 15 March 2016



From left: Christian de Barrin, CEO of HOTREC, Isabella De Monte, Member of the European Parliament, Janis Valodze, President of Hotelstars Union, Susanne Kraus-Winkler, HOTREC President, Carlo Corazza, Head of Unit, DG Grow, European Commission, at the European Parliament event

BEST PRACTICES AND KNOWLEDGE SHARING ACTIVITIES

HOTREC serves as a hub for its Members to share their best practices in priority fields for the hospitality industry. As part of it, HOTREC developed a workshop on the sharing economy and joined a European-funded project on accessibility. HOTREC also provided a platform to its Members to present their activities to promote responsible drinking and to promote refugees' integration into the labour market through trainings in the hospitality sector.

A 'sharing' economy workshop during HOTREC 73rd General Assembly

As part of the different best practice sharing activities developed by HOTREC, a workshop on the topic of the 'sharing' economy was organised on 29 April 2016 for the Members of the association. The half-day event gave the opportunity to all Members to update their knowledge on the different developments in relation to the 'sharing' economy and to express their own experiences in relation to its growth in their respective countries. The growing market of 'home restaurants' - offering meals for money in apartments without any reassurance on hygienic conditions - was covered by the workshop as well. Besides the workshop, a webinar was also part of the process of updating HOTREC Membership and to exchange practices on matters in relation to the 'sharing' economy.

Besides this event, HOTREC also increased its offers for its Members to exchange experiences and best practices within its membership. Apart from the different meetings, inquiry tools and newsletters, a specifically dedicated platform for the sharing of best practices shall further enhance cooperation and the possibilities for learning from each other within the hospitality industry.

Fast Track procedure for newly arrived chefs – a best practice example in Sweden

During HOTREC's 71st General Assembly held in The Hague on 5-6 November 2015, HOTREC's Swedish member Visita presented a best-practice aimed at tackling the hospitality industry's shortage of certain job profiles.

The Swedish hospitality sector is indeed tackling the shortage of chefs, through a fast track procedure jointly conducted by Visita, The Hotel and Restaurant Union (HRF), and the Swedish Public Employment Service. Through this procedure any experienced individual, including newly arrived immigrants can validate his skills in his mother tongue. If the potential employee successfully proves his expertise as chef he can be offered an employment contract in the tourism sector.

This example has proved to be successful in the integration of newly arrived immigrants and/or unemployed people into the labour market, and will be extended to other job profiles.



Mr. Roman Brecely, Slovak Minister of Transport, Construction and Regional Development, and Ms. Susanne Kraus-Winkler, President of HOTREC, during HOTREC 73rd General Assembly in Bratislava

Developing online training on accessibility for hospitality professionals

HOTREC participates in a project funded under the Erasmus+ programme Key Action 2 - Cooperation for Innovation and the Exchange of Good Practices.

The main objective of the project is to design and develop multi-facet training tools on accessibility issues, addressed and tailored to tourism SMEs. A self-learning mobile application as well as a Massive Open Online Course (MOOC) shall help tourism entrepreneurs, especially SMEs, to get more familiar with the needs of people with disabilities, to make a self-assessment of their facilities and to give back the gathered information.

With this project, HOTREC contributes to enhancing the skills of hospitality entrepreneurs and staff of establishments in relation to accessibility issues. The free online training and the mobile application developed by the project partners should provide an opportunity for all types of tourism enterprises, with a focus on the small and micro sized ones, to learn about accessibility issues, even if they are not familiar yet with the matter. After making use of the training tools, participating enterprises will be able to be visible on the web, with a reliable description of their offer, reaching a target whom they are normally overlooking as they feel not experienced enough to be able to cater for them properly.

The online training course and the app will be available beginning of 2017 to tourism entrepreneurs willing to learn. For further information on the project please visit www.apptouryou.eu.

Promoting responsible alcohol drinking: a duty of care for the industry

As part of its duty of care and in compliance with its commitment at the European Alcohol and Health Forum, HOTREC gathers, on a yearly basis, voluntary measures developed by its Members to curb alcohol related harm. These measures are disseminated by HOTREC through its entire membership, EU institutions and relevant stakeholders, so that best practices are spread across Europe.

Best practices, amongst others, include the development of trainings to servers on responsible service and drinking, the development of a quality night label, the distribution of breath analysers in the bars, discotheques, etc., the creation and promotion of non-alcoholic drinks for young people, cooperation with public authorities on the implementation of joint measures and campaigns, the distribution of coloured bracelets which indicate the age range (so that minors do not have access to alcohol), the development of multi-stakeholder partnerships, road safety campaigns; etc.).



2015 HOTEL RESULTS ACROSS EUROPE, BY MKG GROUP

Hotel KPIs continue to grow, driven by southern countries and CEECs

SEGMENT	Occupancy Rate		ADR		RevPAR	
	%	Change (pts)	€ VAT excl.	Change (%)	€ VAT excl.	Change (%)
2*	70,7%	0,9	62,2	2,9%	44,0	4,2%
3*	68,9%	1,1	74,8	1,7%	51,5	3,3%
4*	70,1%	1,4	106,9	3,0%	74,9	5,2%
5*	70,8%	1,3	187,4	3,5%	132,6	5,4%
GLOBAL	69,7%	1,1	91,8	2,9%	64,0	4,5%

Source: HotelCompset Database

Europe's hotel industry continues its positive trend with significant growth in 2015, a sign that the continent remains a stronghold for chain hotels despite growing tension due to security issues. Hotels on the continent saw their occupancy rates progress 1.1 points last year, together with a significant increase in average daily rates (+2.9%). The combination of these two factors allowed the Revenue per available room (RevPAR) at European properties to confirm the good results glimpsed in recent years with a 4.5% increase throughout the continent.

The increase observed follows the economic recovery for some of the member countries of the European Union, particularly in Central Europe and the Iberian Peninsula. While the RevPAR is up on all hotel segments compared to 2014, it is once again the 4* et 5* categories that drove hotel growth. These categories posted respectively 5.2% and 5.4% growth in their RevPAR in 2015, with growth in average daily rates by 3% and 3.5%.

Southern Europe continues to progress, France occupancy rate decreases

Countries around the Mediterranean basin benefited from the summer that resulted in strong growth for the hotel industry. The RevPAR experienced double-digit growth in the south of the continent; growth in the indicator is by 11.6% in Italy, 12.5% in Spain, and 13.5% in Portugal. These destinations have also benefited from tourists that defected from their usual destinations such as Tunisia, Egypt and Turkey where security has seriously compromised arrivals of foreign clientele.

British hotels remain full with an occupancy rate that remains high: 79.2%, the best performance in European last year. The occupancy rate reached 76% on Luxembourg's hotel market, where the RevPAR rose 17.1% thanks to an increase in average daily rates by 15.5%: resulting from the rotating Presidency of the Council of the European Union. With steady growth in the occupancy rate and prices, hotel operators in the Netherlands should also look back on 2015 fondly: the national RevPAR shows an 8.1% increase on the year.

In 2015, French properties once again lowered results for Europe's hotel industry. The sector struggled in a particularly difficult context that was marked by the terrorist attacks in January and November, and by the subsequent mistrust of some international clientele. France is the only European country where the occupancy rate is down across the year, albeit by 0.3 points. At just 0.1% across 2015, the increase in the country's RevPAR is the weakest on the continent.

Source: www.mkg-hospitality.com

2015 KEY FIGURES FOR RESTAURANTS AND BARS IN SELECTED EUROPEAN COUNTRIES

In 2015, restaurants experienced a strong raise in turnover in several European countries.

Austria: the café and bar sector under pressure

The trend witnessed in 2014 was confirmed in 2015, with a decline in the number of businesses for inns (-2.7%), bars/discotheques (-1.35%), cafés (-1.9%) and café-restaurants (-1.9%). The number of classical restaurants however grew by 3.3%.

Belgium: contrasted economic results

While restaurants experienced a strong growth (+5.1 % in the number of employees and +4.77% in the turnover in the first semester 2015 compared to 2014), the bar/café sector showed a reverse trend, with a decrease in both turnover (-0.4% in the first semester 2015) and number of employees (-4.2%).

Germany: +4% in restaurants' turnover

The German restaurant sector delivered a solid economic performance, with a growth of its annual turnover of around 4%, while employment in the sector grew by 1.4 %. The bar/café sector registered a more moderate increase of activity (+0.8% in turnover and +0.4% in the number of employees).

Hungary: double-digit growth in annual turnover

Despite a sharp decrease in the number of restaurants and bars in Hungary (-3.67%), the annual turnover of this sector grew by 14.16% in 2015.

Lithuania: strong growth of the restaurant and bar sector

2015 was a good year for the sector in Lithuania, as the annual turnover of the sector grew by 5.8%, while the number of establishments grew by 9.8%, and the number of employees by 60%.

Spain: consolidation of the recovery and record number of employees

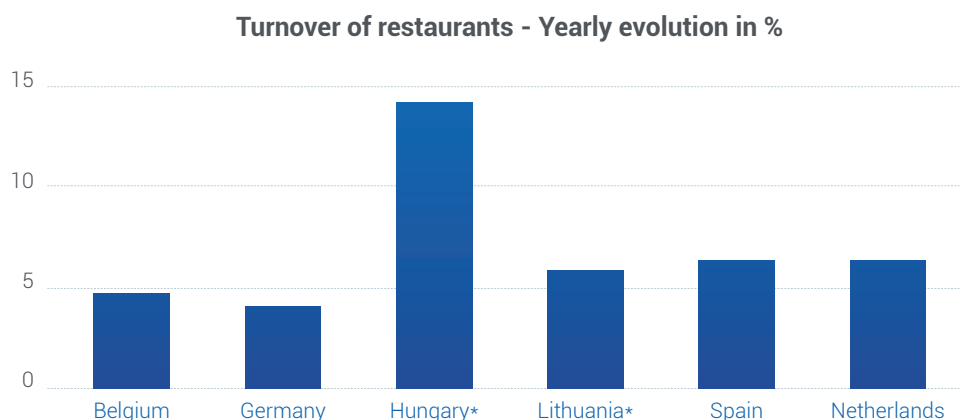
The positive development experienced in 2014 were confirmed in 2015, as the annual turnover rose for both restaurants (+6.2%) and bar/café (+4.3%). Moreover, the number of employees grew by 7.2%, meaning that there is now for the first time more employees than in 2008.

The Netherlands: strong growth in annual turnover

A strong growth was experienced in all segments (+6.2% annual turnover for restaurants, +6.35% for fast service restaurants and +4.22% for cafés). Similar trends were witnessed for the number of restaurant businesses (+3.76%) and fast service restaurants (+5.47%), while the number of cafés decreased slightly (-1.66%).

United Kingdom: sustained growth of the sector

The combined turnover of pubs, bars, restaurants and café grew in 2015 by around 2.66% to reach 57.8 billion £ (estimate), with a growth which concerned both restaurants (+3.58%) and pubs (+1.3%).



* Figures for Hungary and Lithuania aggregate data for both restaurants and cafés

MEET THE TEAM AND THE EXECUTIVE COMMITTEE



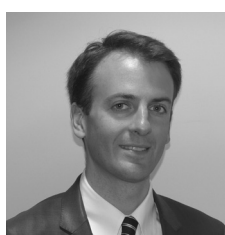
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*HOTREC Executive Committee and CEO with UNWTO Secretary General Taleb Rifai
during HOTREC General Assembly in The Hague on 5 November 2015*

ACCESS THE MEMBERSHIP



FULL MEMBERS

AUSTRIA

APHA-Fachverband Hotellerie
www.hotelverband.at
President: Siegfried Egger
CEO: Mag. Matthias Koch

APRA-Fachverband Gastronomie
www.gastronomieverband.at
President: Mario Pulker
CEO: Dr. Thomas Wolf

VVAT- Austrian Professional Copyright Users Association
www.vvat.at
President: Komm.Rat Fritz Kaufmann
CEO: Mag. iur. Andreas Hüttner

BELGIUM

HORECA Vlaanderen
www.horecavlaanderen.be
President: Filip Vanheusden
CEO: Danny Van Assche

Fed. Ho.Re.Ca. Wallonie
http://horecawallonie.be
President: Thierry Neyens
Secretary General: Pierre Poriau

BULGARIA

BHRA - Bulgarian Hotel and Restaurant Association
www.bhra-bg.org
Chairman : Blagoi Ragin

CROATIA

UPUHH-Association of Employers in Hospitality Industry
www.upuhh.hr
President: Kristian Šustar
CEO: mr.sc. Iva Bahunek

THE CZECH REPUBLIC

AHRCR-The Czech Association of Hotels and Restaurants
www.ahrcr.cz
President: Ing. Václav Stárek
General Secretary: Ing. Klára Stárek Zachariášová

DENMARK

HORESTA-Association of the Hotel, Restaurant and Tourism Industry in Denmark
www.horesta.dk
President: Jens Zimmer Christensen
CEO: Katia K. Østergaard

ESTONIA

EHRA-Estonian Hotel and Restaurant Association
www.ehrl.ee
President: Verni Loodmaa
General Manager: Maarika Liivamägi

FINLAND

FHA-Finnish Hospitality Association
www.mara.fi
President : Harri Ojanperä
CEO: Timo Lappi

FRANCE

CPIH-Confédération des Professionnels Indépendants de l'Hôtellerie
www.cpih-france.com
Confederal President : Gérard Guy
Secretary General: Alain Boutin

FAGIHT-Fédération Autonome Générale de l'Industrie Hôtelière Touristique
www.fagiht.fr
President : Claude Daumas
Director General : Catherine De Bruyne

GNC-Groupement National des Chaînes

www.umih.fr
President: Jacques Barré
Administrator: Samuel Lacombe

SYNHORCAT-Syndicat National des Hôteliers, Restaurateurs, Cafetiers et Traiteurs

www.synhorcat.com
President : Didier Chenet
Director General : Franck Trouet

UMIH-Union des Métiers et des Industries de l'Hôtellerie

www.umih.fr
President : Roland Heguy
Director General: Philippe Delterme

GERMANY

DEHOGA-Deutscher Hotel-und Gaststättenverband

www.dehoga.de
President: Ernst Fischer
CEO: Ingrid Hartges

IHA-Hotelverband Deutschland

www.hotellerie.de
President: Fritz G. Dreesen
CEO: Markus Luthe

GREECE

HCH-Hellenic Chamber of Hotels

www.grhotels.gr
President: George Alex. Tsakiris
CEO: Dr. Agni Christidou

HUNGARY

HHRA-Hungarian Hotel and Restaurant Association

www.hah.hu
President: Dr. Ákos Niklai
Secretary General: István Kovács

IRELAND

IHF-Irish Hotels Federation

www.ihf.ie
President: Joe Dolan
Chief Executive: Tim Fenn

RAI-Restaurants Association of Ireland

www.rai.ie
President: Anthony Gray
Chief Executive: Adrian Cummins

ITALY

FEDERALBERGHI-Federazione delle Associazioni Italiane Alberghi e Turismo

www.federalberghi.it
President: Cavaliere del Lavoro Bernabò Bocca
Director General: Dott. Alessandro Massimo Nucara

FIPE-Federazione Italiana Pubblici Esercizi

www.fipe.it
President: Dott. Lino Enrico Stoppani
Director General: Dott. Marcello Fiore

LATVIA

AHRL-Association of Latvian Hotels and Restaurants

www.hotels-restaurants.lv
President : Janis Valodze
CEO: Mag. Santa Graikste

LITHUANIA

LHRA-Lithuanian Hotel and Restaurant Association

www.lvra.lt
President : Evalda Siskauskiene
Managing Director: Egle Lizaityte

LUXEMBOURG

HORESCA- Fédération Nationale des Hôteliers, Restaurateurs et Cafetiers du Grand-Duché de Luxembourg
www.horesca.lu
President : Alain Rix
Secretary General : François Koepp

MALTA

MHRA-Malta Hotels and Restaurants Association
www.mhra.org.mt
President: Tony Zahra
CEO: Andrew Agius Muscat

THE NETHERLANDS

KHN-Dutch Hotel, Restaurant and Café Association
www.khn.nl
Chairman of the Board: Toon Naber
General Director : Lodewijk van der Grinten

POLAND

IGHP- Chamber of Commerce of the Polish Hotel Industry
www.ighp.pl
President: Ireneusz Węglowski
Secretary General: Marcin Mączyński

PORTUGAL

APHORT- Associação Portuguesa de Hotelaria, Restauração e Turismo
http://www.aphort.com/
President: Rodrigo Pinto de Barros
Executive Deputy President: António Condé Pinto

SLOVAKIA

ZHRSR- The Slovak Association of Hotels and Restaurants
www.zhrsr.sk
President: Patrik Bočák
Secretary General: Marek Harbulák

SLOVENIA

TGZ – Tourism and Hospitality Chamber of Slovenia
www.tgzs.si
President: Mr. Andrej Prebil
Director: Ms. Majda Dekleva
President of Slovenian Hoteliers Association:
Mr. Gregor Jamnik

SPAIN

CEHAT-Confederación Española de Hoteles y Alojamientos Turísticos
www.cehat.com
President : Juan Molas
Secretary General: Ramón Estalella
FEHR-Federación Española de Hostelería
www.fehr.es
President: José M^a Rubio Marín
Secretary General: Emilio Gallego Zuazo

SWEDEN

VISITA-Swedish Hospitality Industry
www.visita.se
President: Maud Olofsson
CEO: Eva Östling

THE UNITED KINGDOM

The ALMR- The Association of Licensed Multiple Retailers
www.almr.org.uk
Chairman: Steve Richards
Chief Executive: Kate Nicholls

ASSOCIATE MEMBERS

NORWAY

NHO Reiseliv-Norwegian Hospitality Association
www.nhoreiseliv.no
President: Ole Warberg
CEO: Kristin Krohn Devold

LICHTENSTEIN

LHGV - Liechtensteiner Hotel & Gastronomieverband
http://www.lhgv.li/
President: Valentin Kirchhofer
Member of the Board: Dr. Marcello Scarnato

OBSERVERS

SWITZERLAND

GASTROSUISSE - Verband für Hotellerie und Restauration
www.gastrosuisse.ch
President: Casimir Platzer
Director: Remo Fehlmann

HOTELLERIESUISSE - Swiss Hotel Association
www.hotelleriesuisse.ch
President: Andreas Züllig
CEO: Dr. Christoph Juen

TURKEY

TUROB- Hotel Association of Turkey
www.turob.com
President: Timur Bayindir
General Manager: İsmail Taşdemir

TÜROFED-Turkish Hoteliers Federation
www.turofed.org.tr
President : Osman Ayik
General Manager: Savaş Çolakoğlu

Membership List valid as of April 2016

MEMBERS OF THE EXECUTIVE COMMITTEE

Mag. Susanne Kraus-Winkler
MRICS, HOTREC President, Vice-President of APHA, Managing partner of the LOISIUM Hotel Group

Dr. Akos Niklai
HOTREC Vice-President, President of HHRA, Hungarian Hotel and Restaurant Association, Vice-President of Business Hungary, Managing Director of Kárpátia Hospitality Co.

Marinus Cordesius
LI.M, HOTREC Treasurer, Director Policies/International Affairs of KHN, Koninklijk HORECA Nederland

Ramon Estalella
HOTREC EXCOM Member, Secretary General of CEHAT, Confederación Española de Hoteles y Alojamientos Turísticos

Markus Luthé
HOTREC EXCOM Member, CEO of IHA-D, Hotelverband Deutschland (IHA)

Dr. Agni Christidou
HOTREC EXCOM Member,
CEO of HCH, Hellenic Chamber of Hotels

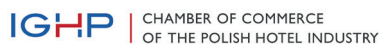
Adrian Cummins
HOTREC EXCOM Member,
CEO of RAI, Restaurants Association of Ireland

Danny Van Assche
HOTREC EXCOM Member, CEO of HORECA Vlaanderen

Paolo Rossi
HOTREC EXCOM Member, FEDERALBERGHI Executive Board Member, President of Federalberghi Lombardia, Owner and Manager of Hotel Bellerive and Hotel Laurin

Bernd Geyer
HOTREC Honorary President

Joan Gaspart
HOTREC EXCOM Observer, Vice President EHF, European Hospitality Foundation, President of HUSA HOTELS



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